Let's Get Started!

Welcome & Introductions

- Dr. Keen, President of FTCC

- Doug Hewett, City Manager

- Shepherd Johnson Consulting

Session Overview

- **Agenda & Desired Outcome:**

  - *To review of our current strategic initiatives, consider new initiatives, and come to agreement on a prioritized list of Targets for Action, in preparation for budget decisions later this Spring.*

FOCUS ON THE FUTURE

Feedback from CC Individual Interviews

- *Keep the retreat focused and on track*
- *Want to leave with a narrowed, defined, list of TFA that have measureable results and are realistic*
- *Need to establish better CC and staff relationships and establish a more defined protocol for communication*
- *Improved relationship & communication between CC members*
- *Want to make decisions that are fiscally responsible*
- *Need to focus more on "core" services*

OVERALL RETREAT OUTCOME: Develop unified action plans that focuses on the City's Core Services and that is clearly defined with measurable outcomes so that staff can accomplish.

Code of Conduct: 115.5
Summarized

- Adhere to Core Values: RESPECT
- Focus on what is best for the city
- Be open, transparent, direct, truthful
- Keep things objective, not personal
- Do not speak for another council member
- Focus on the future, not past
- Decide as a Council and support the CC decision

Common Courtesies

- **Stay focused on discussion and avoid getting off on tangents**

- **Keep things objective and avoid making things personal – focus on issue, not person**

- **Avoid interruptions, cell phones, or anything that distracts from the work**

- **What else would you like to add?**

6

Let's Get Warmed Up!

Ice breakers in the wild

Putting each person's perspective together to form a unified perspective

Team Development   Stages

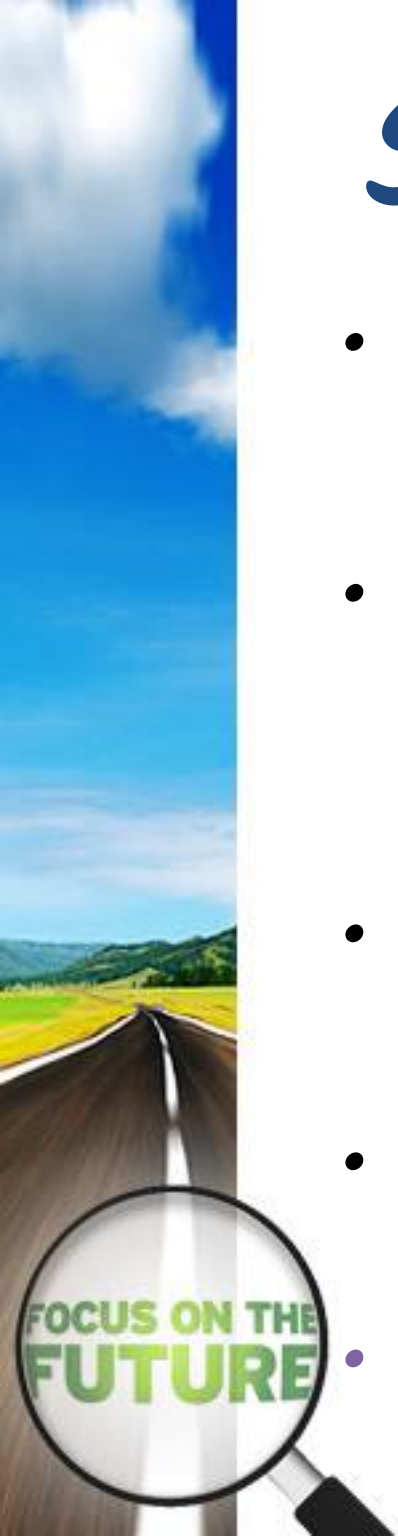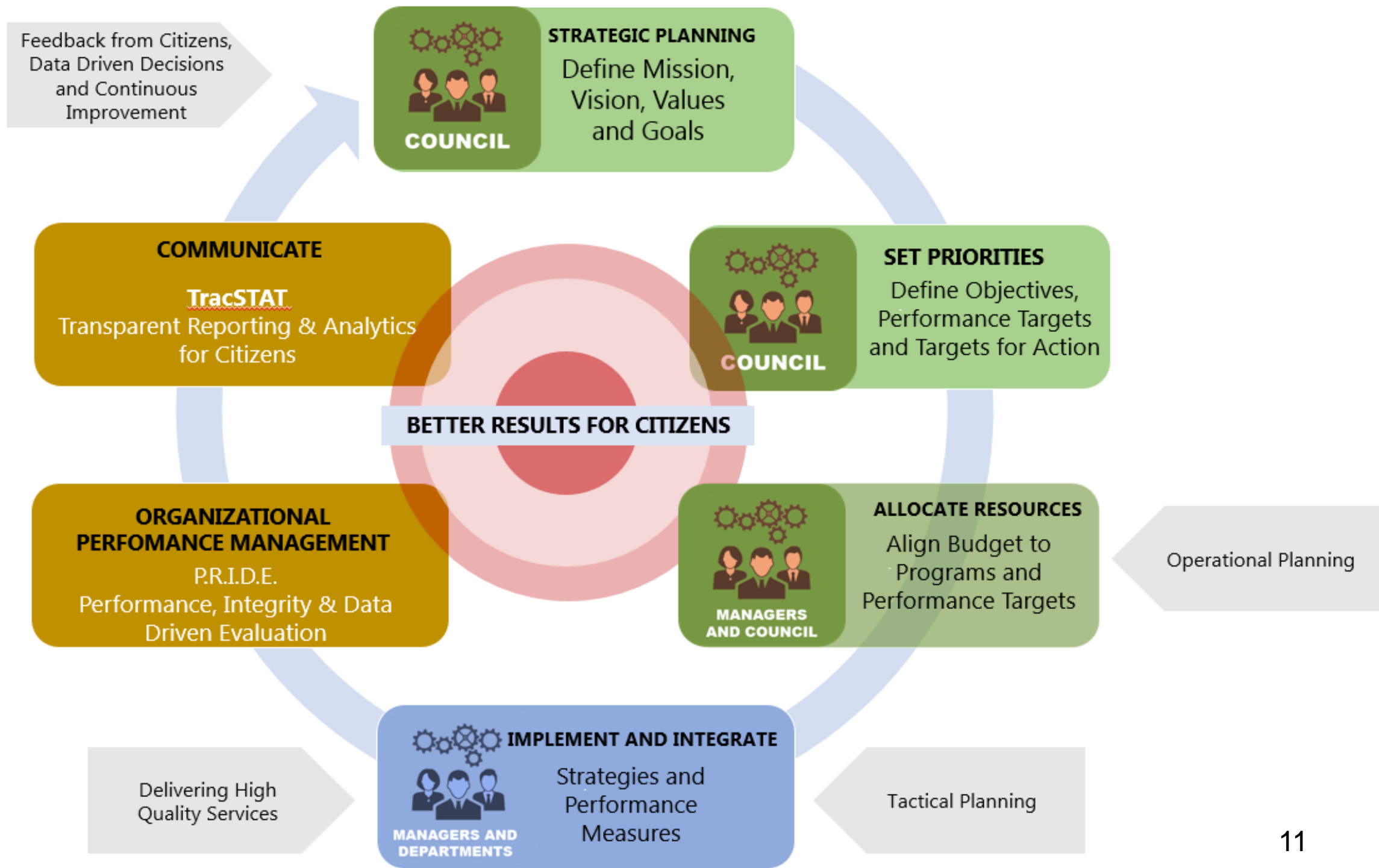| Forming	Storming	Norming	Performing	Adjourning
Team acquaints and establishes ground rules. Formalities are preserved and members are treated as strangers.	Members start to communicate their feelings but still view themselves as individuals rather than part of the team. They resist control by group leaders and show hostility.	People feel part of the team and realize that they can achieve work if they accept other view points.	The team works in an open and trusting atmosphere where flexibility is the key and hierarchy is of little importance.	The team conducts an assessment of the year and implements a plan for transitioning roles and recognizing members' contributions.

Strategic Planning: Why?

- A tool to lead into the future while preserving fiscal health and well-being of the City

- Provides transparency and accountability in measuring performance in an effort to protect the TRUST of residents

- A tool to align employees' performance objectives and to align department resources (human, fiscal, etc.)

- It requires us to be REALISTIC in terms of what we can accomplish

- For our City Council, City Manager, and Staff to make the best possible big-picture decisions for the City as a whole
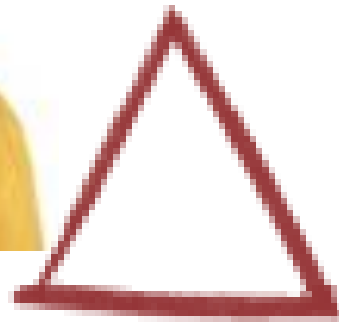
10

Feedback from Citizens, Data Driven Decisions and Continuous Improvement

STRATEGIC PLANNING
Define Mission, Vision, Values and Goals
COUNCIL

COMMUNICATE
TracSTAT
Transparent Reporting & Analytics for Citizens

SET PRIORITIES
Define Objectives, Performance Targets and Targets for Action
COUNCIL

BETTER RESULTS FOR CITIZENS

ORGANIZATIONAL PERFOMANCE MANAGEMENT
P.R.I.D.E.
Performance, Integrity & Data Driven Evaluation

ALLOCATE RESOURCES
Align Budget to Programs and Performance Targets
MANAGERS AND COUNCIL

Operational Planning

IMPLEMENT AND INTEGRATE
Strategies and Performance Measures
MANAGERS AND DEPARTMENTS

Delivering High Quality Services

Tactical Planning

FOCUS ON THE FUTURE

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The Strategic Planning Phases

Planning for the future takes involving all Stakeholders throughout the process!

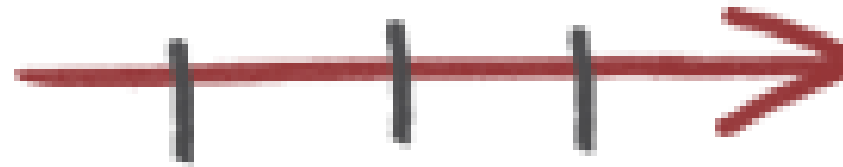| PHASE 1	PHASE 2	PHASE 3	PHASE 4
Staff and Citizens Input	Strategic Planning Retreat	Plan Development and Review	Implementation

Gap Analysis

GAP

Key factors for change

Current State

Desired State

Action Plan

FOCUS ON THE FUTURE

Setting the Stage for Strategic Planning

Core Values
- Vision & Mission
- Strategy: Goals & Objectives
- Action Agenda: Policy Review & Targets for Action
- Performance Measures

Core Values *Core Values*

What do we want Fayetteville to be like for future generations?

What is our unique mission?

How will we accomplish our mission?

What needs to be done first?

How will we track our progress?

What do we value as a team?

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Begin with the End in Mind!

- **Clearly Defined**
- Specific
- Measurable
- **Broken Down into "Milestones"**
- Progress Tracked: Time & Budget
- Communicated to Stakeholders

Your Strategic Plan is

YOUR ROADMAP

FOCUS ON THE FUTURE

Basic Strategic Planning Questions:

- Do you have the financial resources needed to complete the job?

- Do you have enough personnel to work on this?

- Is your staff capable of performing the work, in addition to their daily duties?

- Will staff need to be compensated for additional time?

- Have staff members been provided the proper technology to complete the job?

- How much input do you need from staff in order for you to know if you can complete the job?

- How will you measure success? How will you KNOW when you've successfully met the performance expectation?

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Tracking and Reporting Performance

Welcome to TRACStat!

Transparent Reporting and Analytics for Citizens

Questions or comments? Please contact us at
tracstat@ci.fay.nc.us

Performance

Budget

Targets for Action

Methodology

www.tracstat.fayetteville.nc.gov

Who Does What on This Journey?
Roles & Responsibilities

- Differing roles of County & Local Government

- The City Manager Form of Government

- Roles of CM vs. City Council

Counties & Municipalities: What's the Difference?

County

- Sheriffs, Jails, Youth Detention
- Court Facilities
- Collect Taxes
- Register of Deeds
- Elections
- Mental & Public Health Services
- Social Services
- Alcoholic Beverage Control
- Substance Abuse Services
- Public Schools & Community Colleges
- Soil & Water Conservation
- Restaurant Inspections
- Animal Control

City

- Police & Fire
- Water Supply & Waste Water Treatment
- Garbage Collection
- Planning, Zoning, Building Inspections
- Airports
- Auditoriums
- Bus Systems
- Cemeteries
- Electric & Gas Systems
- Parks & Rec Programs
- Public Housing
- Traffic Control
- Sidewalks

Council-Manager Form of Government

City of Fayetteville, North Carolina

Roles and Responsibilities

Mayor

- Presides at City Council Meetings
- Calls special meetings
- Votes

Council

- Governs
- Appoints and oversees City Manager and City Attorney

City Manager

- Performs duties assigned by Council
- Oversees hiring of City staff
- Supervises departments
- Prepares budget
- Reports to Council

Council-Manager-Staff Requests for Information: Code of Conduct 115.15

1. Simple Info (5-20 min): Contact Assistant CM; not necessary to share with all CC

2. Complex Info or Research (20+ min): Contact CM and CM will respond to all CC

3. Question on Agenda Item: Contact CM or City Attorney, who will respond to all CC

4. Request for Lobbying or Legislative Advocacy: Submit request to CM for assignment to staff or lobbyist as appropriate.

5. Request of PWC for Info: Submit info request to CM for assignment to staff.

6. Citizen Service Requests: Refer the citizen to the appropriate person or department; the Corporate Communications Director will be the point of contact for follow-up tracking, or further resolution.

(See full document for 7-12).

Adopted 4/8/13

What Staff Needs to Know about Elected Officials

- **Elected officials have different needs than staff**. They must be responsive to the needs of their constituents which may at times outweigh issues of effectiveness or efficiency.

- **Elected officials want to know where various groups stand on an issue** to balance the conflicting values that often come into play during the policymaking process.

- **Elected officials do not like surprises.** Staff's credibility can be undermined if new information is introduced at a public meeting. Councilmembers will think that the staff has not done their job of providing this information to them for consideration sooner.

- **Elected officials like to have choices**. Nobody likes to feel backed into a corner where there is only one solution. Even a brilliant staff proposal may not carry the day if other choices were not seriously considered.

What Elected Officials Need to Know about Staff

- **Some key staff belong to national and state associations that hold members to professional and ethical standards.**

- **Explore challenging issues with staff and encourage their creativity.** Staff may assert that "we can't do this because it violates technical standards." Engaging in a discussion of what can else can be done to achieve the goal may create a win-win solution.

- **Get to know and trust key staff.**

- **Treat each other respectfully.**

- **Avoid public criticism of each other; it only makes for martyrs.**

- **Show appreciation for good work.** Say "thanks" and Share credit. Appreciating the differing roles of your team will improve the policymaking and decision-making process.

ASSESS 4 SUCCESS

Time for a Small Group Exercise to Assess Our Current Reality!

Strengths
(areas you do well or advantages of your organization)

Opportunities
(external factors that may contribute to your organization and can build up your strengths)

SWOT

Weaknesses
(areas to be improved)

Threats
(potential problems/risks caused by external factors that your organization may face)

Small Group SWOT Analysis

1. What are Fayetteville's greatest strengths?

2. What needs to be changed or improved?

3. What threats do we face?

4. What new opportunities do we need to consider?

Fayetteville: City Snapshot

Where are we now?

Moving forward in 2017!

Population:
- ❖ 2014 = **329,411**
- ❖ By 2020 = **340,425**
- ❖ 7th most urbanized county in NC
- ❖ 6th largest City in NC

Fort Bragg:
- ❖ 53,700 troops + 14,000 civilians

Median Age: 30.9 (U.S. median age 37.2)

Race:
- ❖ White – 51.87%
- ❖ Hispanic – 9.51%
- ❖ Black – 35.86%
- ❖ Asian – 2.29%

Fayetteville: City Snapshot

Where are we now?

Moving forward in 2017!

High School Grads:

89.2% of people age 25 and older
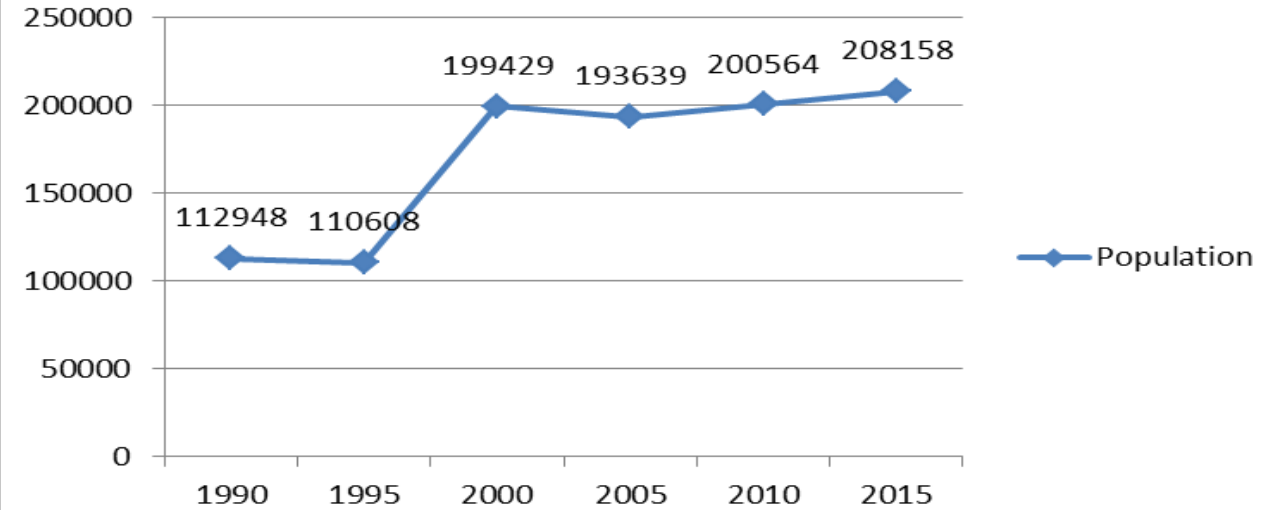
College Grads:

22.7 % of people age 25 and older

Veterans:

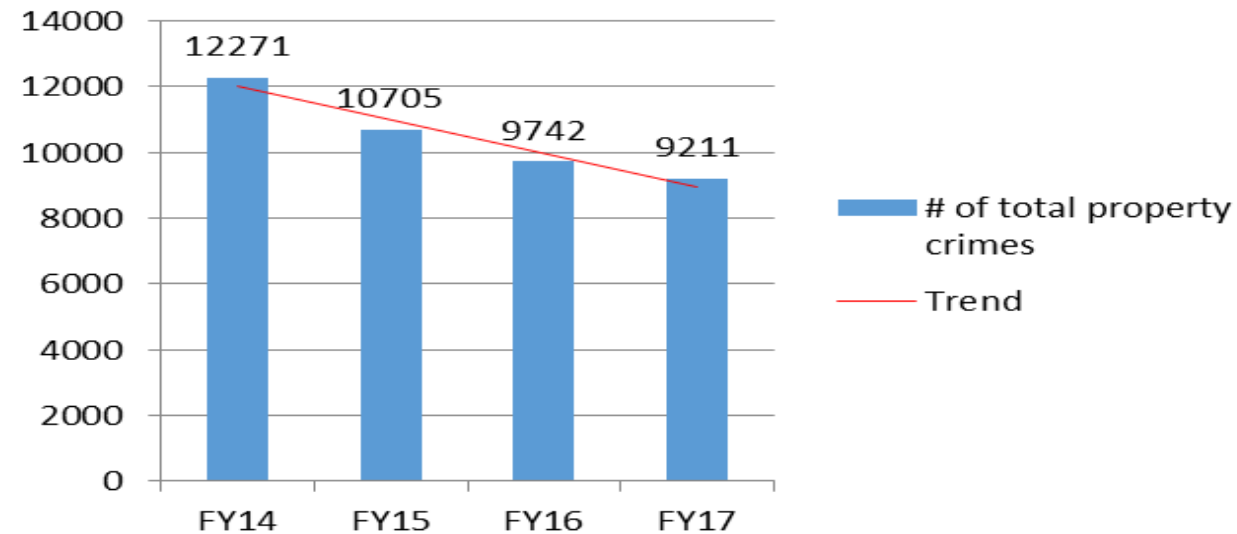50,010 (3rd in the state, behind Wake and Mecklenburg)
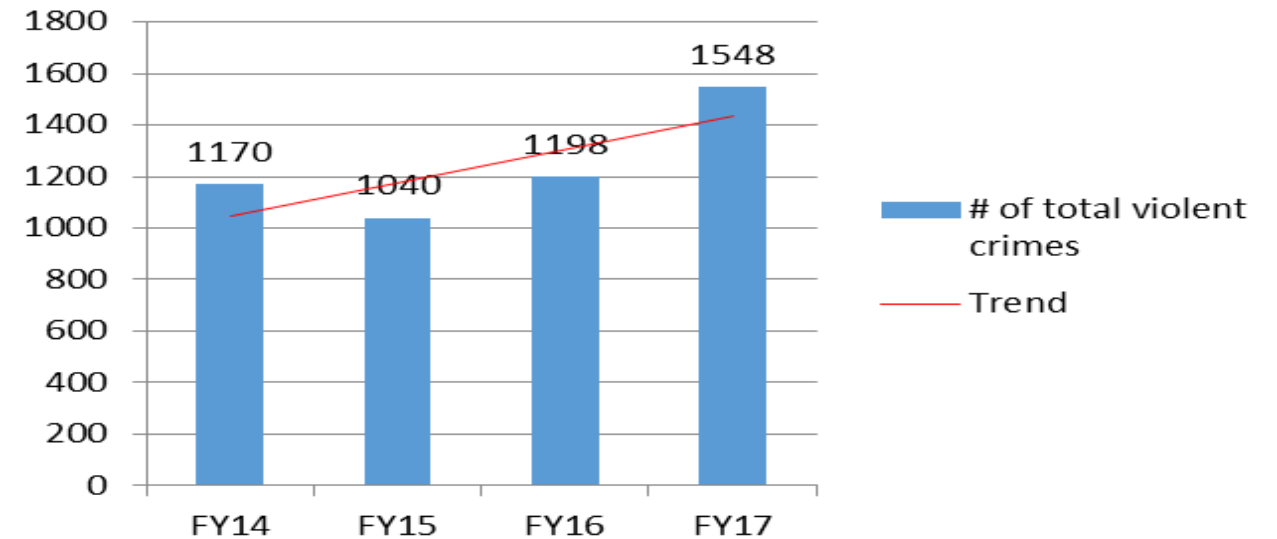
Data Indicators:

Median Household Income

- FY09: 42460
- FY10: 43284
- FY11: 44266
- FY12: 44756
- FY13: 44900
- FY14: 44514
- FY15: 44778

Legend: Median Household Income, Trend

Population

- 1990: 112948
- 1995: 110608
- 2000: 199429
- 2005: 193639
- 2010: 200564
- 2015: 208158
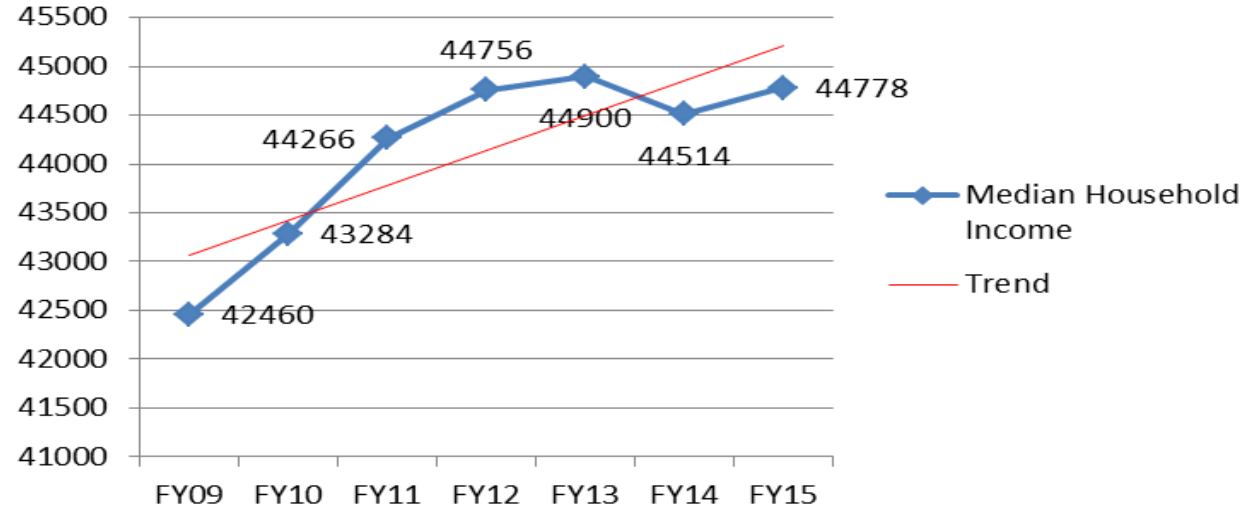
Legend: Population

of total property crimes

- FY14: 12271
- FY15: 10705
- FY16: 9742
- FY17: 9211

Legend: # of total property crimes, Trend

of total violent crimes

- FY14: 1170
- FY15: 1040
- FY16: 1198
- FY17: 1548

Legend: # of total violent crimes, Trend

Categories of Real Property

Taxable Real Property
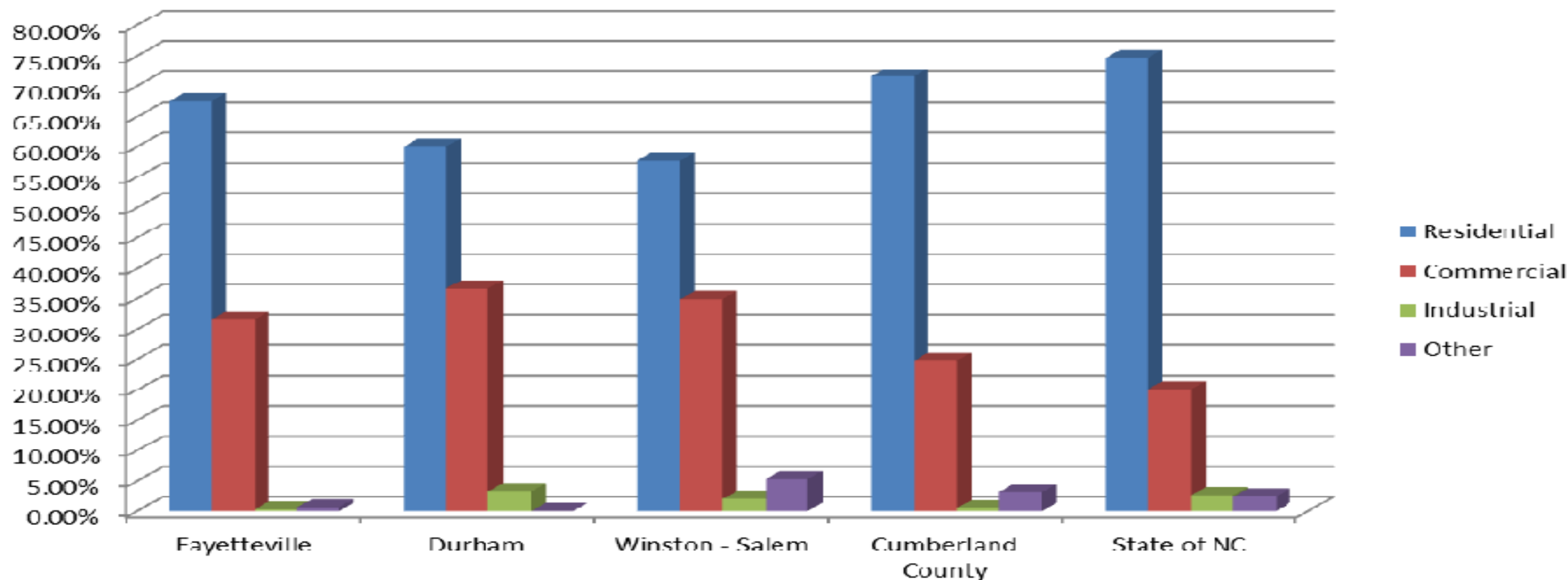
FY 17 Café Conversation

Peace, Prosperity, and Quality of Life

- **Visibility of police in neighborhoods**

- **Economic diversity, job training, expanded tax base**

- **Green spaces and trails**

- **Affordable and transitional housing**

In order to improve overall satisfaction with City services, the City of Fayetteville should emphasize the following areas:

- **Traffic Flow**
- **Maintenance of City streets**
- **Economic & Business Development**
- **Police Services**

Next survey

FY 2018

FY 2017
Employee Opinion Survey

Positive Outcomes

- **Mean response scores increased over 2014 scores on 83% of the statements**
- **Four out of six key general statements are at or near the recommended mean score of 4.7**
- **Customer service, City goals, and City core values are high priorities for employees**

Next Steps

Execute employee focus groups to determine root causes and form action plans.

FY 2017 Employee Opinion Survey

Areas Identified for Improvement

- Employee appreciation
- Communication between Council, Management, and Staff
- Processes for dealing with poor performance
- Professional development and job training
- Overall employee satisfaction between 5 and 9 years of service

Next Steps

Execute employee focus groups to determine root causes and form action plans.

Employee Survey Sections
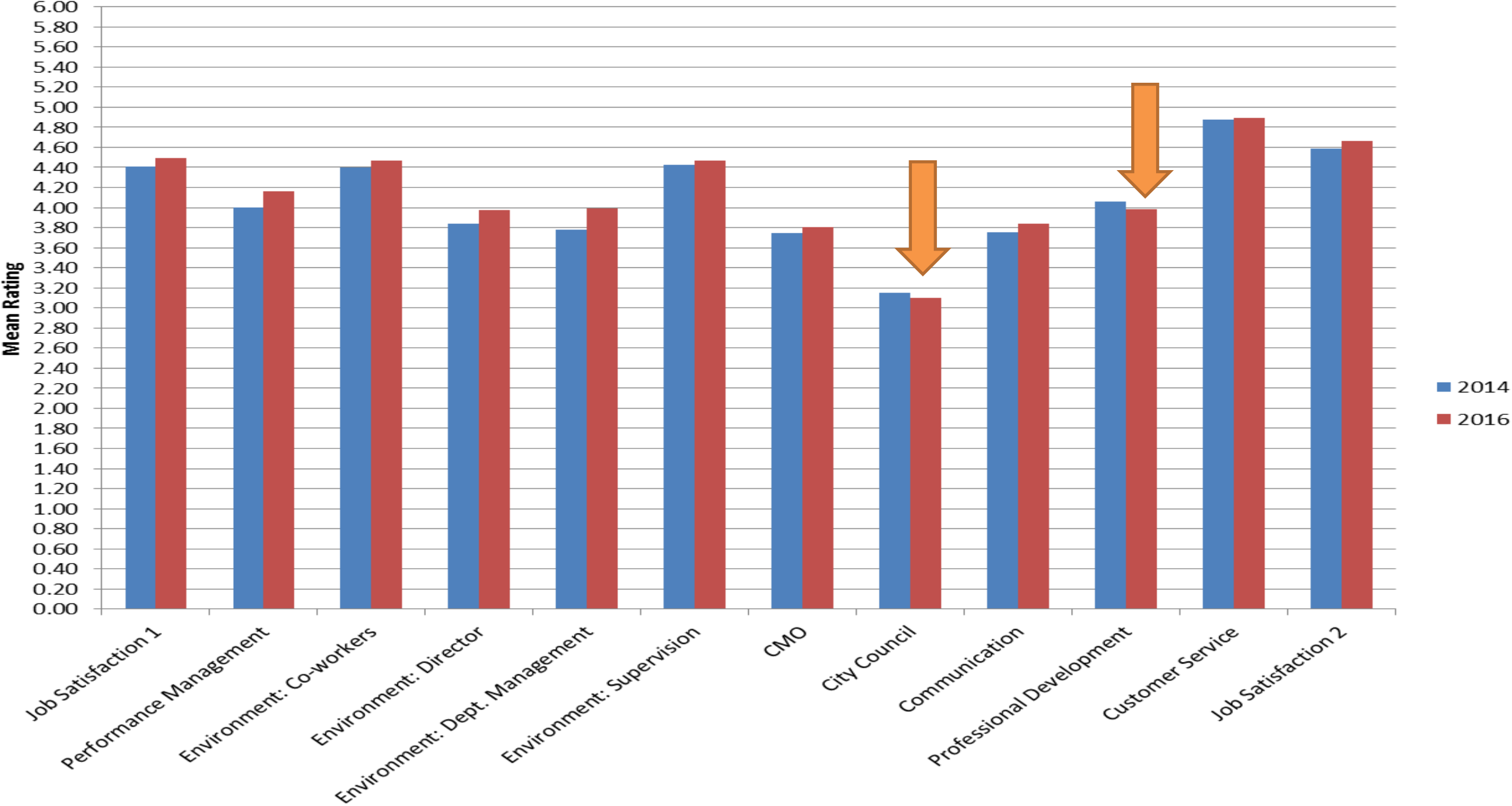
Summary Report on SMT Retreat

"We all need people who will give us feedback.
That's how we improve

Bill Gates, Microsoft

*Small Group Exercise:
Defining Our CORE Services*

- **What is it that we do that no other entity can do?** What services do we provide that no one else can?

- How would you stack or rank those core services according to what is most essential to operations?

A Review of Last Year's Strategic Plan FY 2017-2018:

The City's Vision and Mission

Vision 2027

An attractive, culturally diverse city with a rich heritage that is peaceful, prosperous and connected.

Mission

Fayetteville provides resilient and sustainable municipal services in a cost-effective manner to create a business friendly environment where citizens thrive and prosper.

Core Values

We, the Mayor, City Council, Managers, Supervisors and Employees,
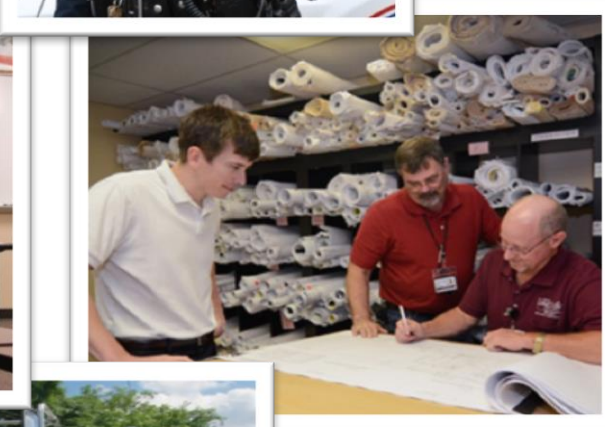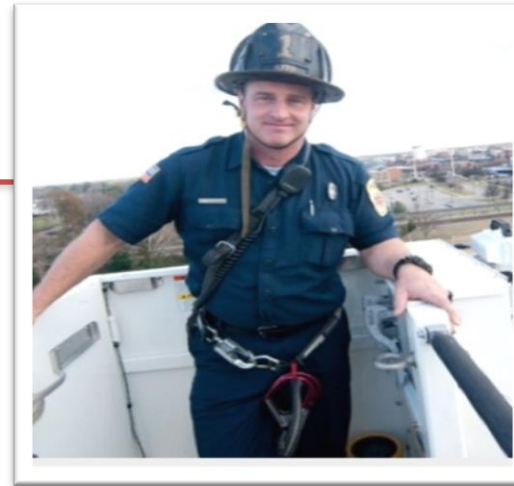
SERVE with

Responsibility

Ethics

Stewardship

Professionalism

Entrepreneurial Spirit

Commitment

Teamwork,

...to safeguard and enhance the public trust in City government.

The City's Goals 2022

The City of Fayetteville will be a safe a secure community.

The City of Fayetteville will have a strong, diverse and viable local economy.

The City of Fayetteville will be designed to include vibrant focal points, desirable industrial, commercial and residential opportunities with high quality and sustainable infrastructure.

Fayetteville will be a highly desirable place to live, work and recreate with thriving neighborhoods and a high quality of life for all residents.

Fayetteville will have unity of purpose and sustainable capacity across the organization.

Fayetteville will continue to develop and expand strong and active community connections.

Completed Targets For Action

Congratulations!

Safe and Secure Community	
FY 15 Top Policy Priority: Crime/Police Department- 47 More police officers	FY 16 Funding for Fire Station 16- to be complete soon!
FY 15 Develop Police community engagements and Next Door	FY 16 Planning for Joint E911 Operations Center
FY 15-16 Temporary Station 16	FY 15- 16 Fire Achieves ISO Class 1 Rating
FY 15 Crime Summit	FY 17 Central District Office
FY 15 Gang reduction strategy	FY 17 Initiate Cadet Program
FY 15 CARS program	FY 17 One Family Program
FY 16 Initiate a step plan for the Fire Department; FY 17 Fire Command	FY 16-17 COPS Collaborative Reform
FY 15-17 Implement Red Light Camera Program	FY 16- 17 Implement Corridor Cameras and Crime Information Center

Completed Targets For Action

GO TEAM!

Strong Diverse and Viable Economy

FY 15- Establish Economic and Business Development Department	FY 17 Murchison Road and Bragg Blvd study
FY 15-17 Promoting Neighborhood Resource Centers	FY 17 Feasibility of Baseball Stadium
FY 15-17 Murchison Road Cat Site 1 acquisition of parcels	FY 17 Prince Charles Master Agreement
FY 15 Preservation of Historic Tax Credits	FY 17 Positing the City to market & recruit business effectively
FY 16 Establish one stop shop for business assistance	FY 17 Preliminary annexation of Shaw Heights moves forward
FY 16 Industrial and technology recruitment partnership	
FY 16 Transitioning Alliance to FC ECD	

Completed Targets For Action

High Quality Infrastructure	
FY 15- 17 Moving forward Comprehensive Land Use Plan	FY 17 Citywide Computerized Traffic Signal System
FY 15-17 Implementation of FayWorx	FY 15-17 Street Resurfacing Program
FY 15 FayFixIt!	FY 16- 17 Research annexation of Shaw Heights and request authority
FY 16 Riverfront Redevelopment Plan	

Completed Targets For Action

Highly Desirable Place to Live

FY 15-17 Pedestrian Safety Initiatives (Sidewalks, trails, bikes)	FY 16-15 Plan Parks and Recreation Bond
FY 15-17 Transit Improvement Plan	FY 16 Grove View Terrace Infill housing rehab
FY 15-17 FAST Center Completion this year!	FY 16-17 Gateways- Coming soon!
FY 15- 17 Working with Habitat for Humanity and Continuum of Care	FY 17 Sidewalk expansion- including Ray Avenue
FY 15 Linear Park and Cape Fear River Trails expand	FY 17 Litter crews and campaign, optimizing loose leaf and adding crews for cutting
FY 15- 17 Airport Renovations	FY 17 Public Art Downtown
FY 16- Homelessness Solution- Zero Functional Veterans homeless	

Completed Targets For Action

Spider-Man Approves!

Sustainable Organizational Capacity

FY 15- 17 Implement Performance Measurement Program- Citizen Driven Focus	FY 15 Create Budget and Internal Audit Departments
FY 15-17 Space Needs Analysis and Renovations- 1st Floor coming!	FY 16 open Data Portal
FY 15-16 GFOA Budget Distinction and ICMA Award for Performance Measurement	FY 16 Create Purchasing Department
	FY 16-17 Total Quality Management and Six Sigma training
FY 15-17 Core Value Awards	FY 16- Digital Cities Award
FY 15-17 Employee and Citizen Surveys are back!	

Completed Targets For Action

Community Connections

FY 15-16 Federal Advocacy Program- OEA Grant, Cops Collative Reform, Census, Military Host Cities Coalition	FY 16-17 Communication Plan development and approval
FY 15-17 Ft Bragg Partnerships; Shared Serves Agreement- 1st of its kind -ASOM	FY 16-17 Develop and Launch new City Website
FY 15-17 Café Conversations	FY 17 Hold Stakeholder Events- Real Talk and Real Solutions
FY 15-16 Develop citywide citizen engagement strategy Out-front meetings	FY 17 Intergovernmental Affairs Program
FY 16-17 Customer Service Focused Initiatives and Training	

CLOSE OF DAY ONE!
THANK YOU FOR YOUR
PARTICIPATION!

Welcome to Day Two!

Fayetteville City Council Strategic Planning Retreat: Feb 19, 2017

Morning Welcome!

- *Doug Hewett, City Manager*
- *Shepherd Johnson Consulting*
- *Wake-Up Group Exercise*

Day 2's Work Session

- **Defining and Measuring Success**
- **Review our Current Targets for Action**
- **Prioritize our Current Targets for Action**
- **Consider New Targets for Action**
- **Decide Priority Level of New Targets**
- **Finish Priority List and Give to CM to Use in Staff Budget Preparation**

FOCUS ON THE FUTURE

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Team Personality

- http://www.humanmetrics.com/cgi-win/jtypes2.asp

Defining & Measuring Success: Begin with the End in Mind

- What does "success" or the end result look like?

- The Difference Between Projects vs. Operations

- Project Constraints

- Each TFA should have a clearly define "scope" with clear milestones, in order to track performance and achieve success

- Each TFA should defined as either a Policy Review, Research, Assessment, Project, or some other final product

Design with the End in Mind!

- The only way to know if you've arrived is if you knew where you were going in the first place! Otherwise, you are just wandering and hope you land someplace good!

- Clearly Define and Specifically articulate the end result you are seeking in objective, observable, measureable terms, defining the meaning of the words chosen.

- Anything can be measured! It is still a measurement, if it tells you more than you knew before.

- Take smaller steps forward, "Go as far as you can see, and when you get there you will see further."

Measuring Success -
Evaluation of Projects

Project

- **Temporary**
- **Unique**
- **Terminates when the current objectives are met**

Operation

- **Ongoing**
- **Repetitive**
- **Does not terminate when the current objectives are met**

6 Constraints of a Project

Risk — What can go wrong, and what can be done about it?

Scope — What exactly is the expected outcome?

Resources — Who and What is required to do the work?

Time — By when should the output be delivered?

Quality — How close the outcome matches expectations?

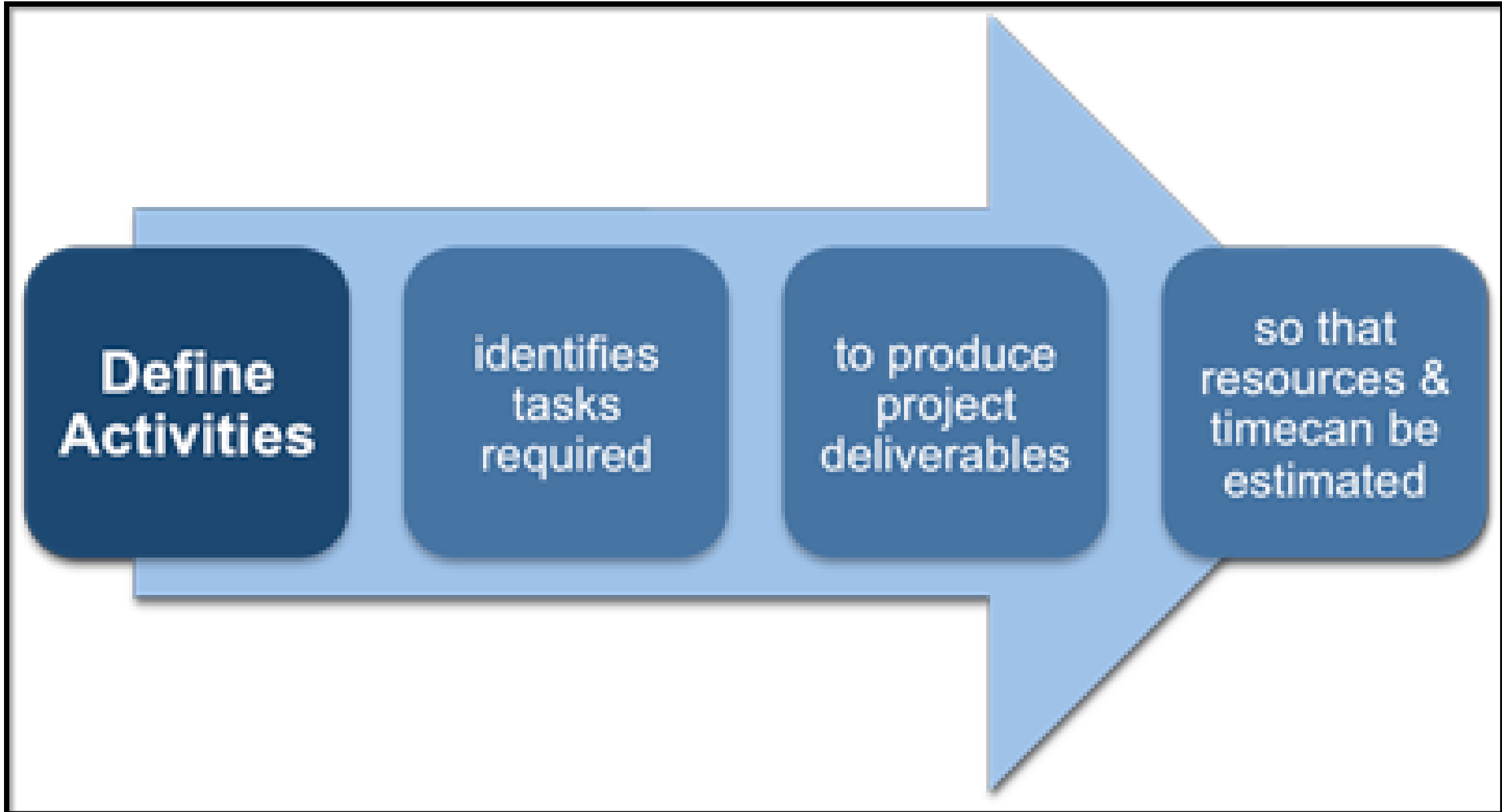Cost — How much money is available to achieve this outcome?

💡 These are part of 10 Knowledge Areas!

Defining the SCOPE

- What specific results do we want?
- What does the **Work Breakdown Structure (WBS)** look like?
- How much time will be given to complete the project?
- How much will the project cost? How much does each "chunk" of WBS cost?
- How will we know when we're finished?

Work Breakdown Structure (WBS)

Define Activities — identifies tasks required — to produce project deliverables — so that resources & timecan be estimated

What Goes into a Cost Estimate?

❑ Land

❑ Construction

❑ Interest during construction

❑ Furniture, fixtures, equipment

❑ Operating Equipment

❑ Inventories

❑ Human Resources: Talent, Time, Training, Staffing Capacity, Consultants

❑ Consider additional strain on other departments or systems

❑ New technology or software

❑ What else?

Questions that need to be answered in budget meetings before final decisions are made on which TFA are to be funded

- Does the City have the **financial resources** needed to complete the job?

- Do you have **enough personnel** to work on the project and still perform their daily duties? Will they need to be paid overtime?

- Do staff members have the **proper technology** to complete the job?

- How much input do you need from staff in order to **know** if you can **successfully accomplish** the job?

Small Group Decomposition Exercise

WHERE

FOCUS GOES
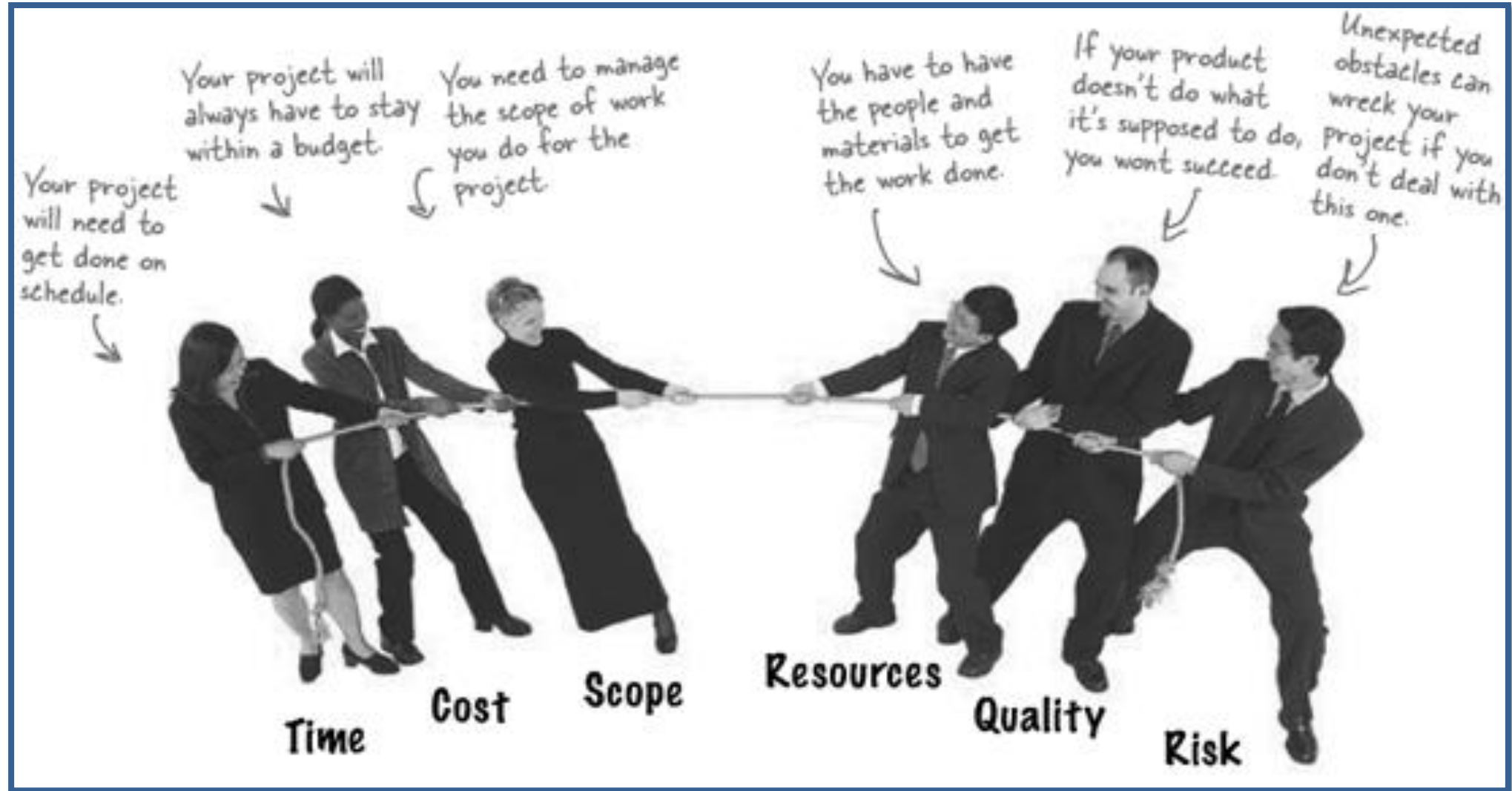
ENERGY FLOWS

Review of Current Targets for Action

OUTCOMES

Fiscal Year | FY 2016 | ▼ | ‹ › |

Tip: click on Strategic Goal to view performance detail

96%

84%

90%

96%

96%

96%

Safe and Secure Community

Strong and Diverse Economy

High Quality Effective Infrastructure

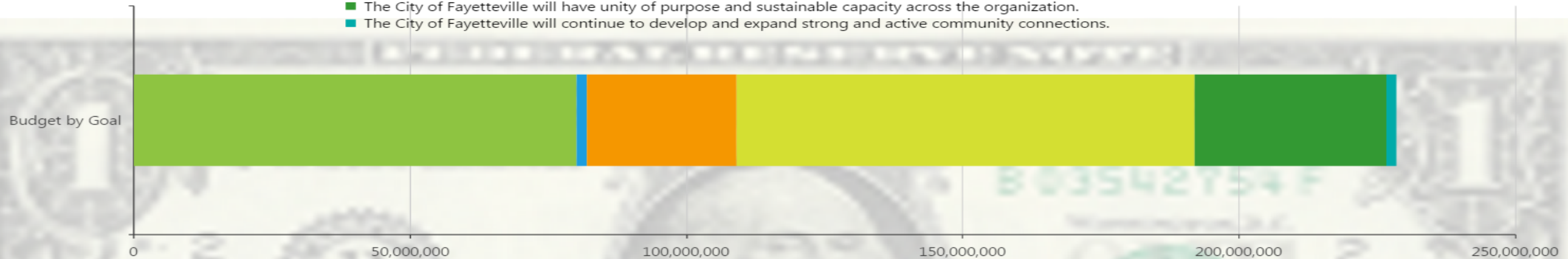Thriving and Livable Neighborhoods

Leadership and Sustainable Capacity

Strong and Active Community Connections

- The City of Fayetteville will be a safe and secure community. ■ The City of Fayetteville will have a strong, diverse, and viable local economy.
- The City of Fayetteville will be designed to include vibrant focal points and desirable industrial, commercial, and residential opportunities with high quality and sustainab
- The City of Fayetteville will be a highly desirable place to live, work, and recreate with thriving neighborhoods and a high quality of life for all residents.
- The City of Fayetteville will have unity of purpose and sustainable capacity across the organization.
- The City of Fayetteville will continue to develop and expand strong and active community connections.

Budget by Goal	Budget by Goal	% Total
The City of Fayetteville will be a highly desirable place to live, work, and recreate with thriving neighborhoods and a high quality of life for all residents.	$82,917,354	36.30
The City of Fayetteville will be a safe and secure community.	$80,125,636	35.08
The City of Fayetteville will have unity of purpose and sustainable capacity across the organization.	$34,498,219	15.10
The City of Fayetteville will be designed to include vibrant focal points and desirable industrial, commercial, and residential opportunities with high quality and sustainable infrastructure.	$27,105,925	11.87
The City of Fayetteville will continue to develop and expand strong and active community connections.	$1,914,378	0.84
The City of Fayetteville will have a strong, diverse, and viable local economy.	$1,860,383	0.81
TOTAL	$228,421,895	100.00

Current Targets for Action: Prioritization Categories

Category A: Critical	Category B: Important	Category C: Community Value
• Legally mandated • Obligated to contract • Required for funding • Penalty if not done • Required for daily survival	• Improve performance • Maintain infrastructure or facilities • Protect financial future • Plan future development • Build organizational competency and capacity • Expand tax base • Reduce risk • Allow for citizen mobility	• Community willing to pay for providing • Makes people choose to live in the City • Makes City attractive to business and industry

Considering New Targets for Action (TFA)

- Does it **best** fall within the responsibilities and mission of a municipality (as opposed to the County, Non-profit, or Private Company)?

- Is it within the **sphere of our control**? Do we have control over the **outcome**? What does success "look" like in realistic terms?

- What specific action or "deliverable" are you expecting the City to accomplish? Define in concrete, **measureable** terms (action verbs)!

- How would you break the project down into **measureable milestones**?

- Which priority category would it fall under? A, B, or C?

New Targets for Action: Prioritization Categories

Category A: Critical	Category B: Important	Category C
• Legally mandated • Obligated to contract • Required for funding • Penalty if not done • Required for daily survival	• Improve performance • Maintain infrastructure or facilities • Protect financial future • Plan future development • Build organizational competency and capacity • Expand tax base • Reduce risk • Allow for citizen mobility	• Community willing to pay for providing • Makes people choose to live in the City • Makes City attractive to business and industry

What if at the budget meeting, you find out there is not enough $$ to fund all of the Targets for Action that you've selected?

What process will you use to lessen our load?

Will you start by eliminating Priority C's first?

IT'S NOT DENIAL

I'M JUST VERY SELECTIVE ABOUT THE REALITY I ACCEPT

FOCUS ON THE FUTURE
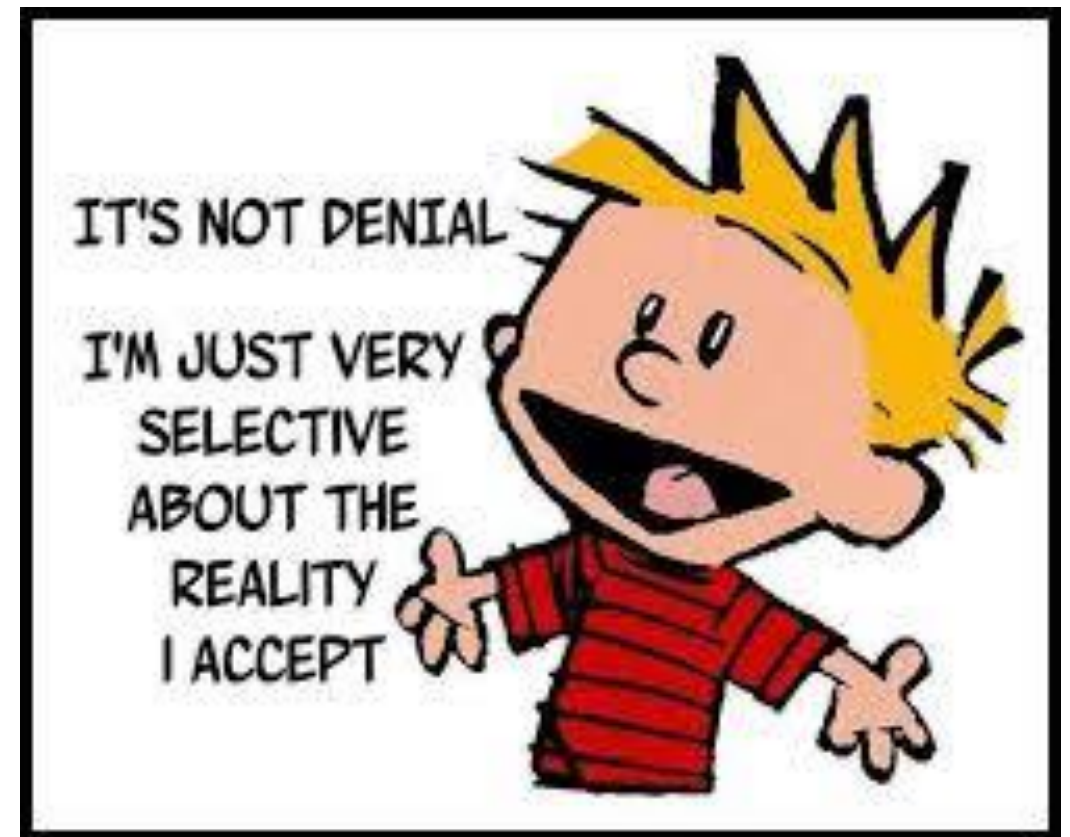
Session Wrap-Up

- **Summary Comments**
  - Session Evaluation Ratings
  - Participant Comments
  - Next Steps: Rebecca Rogers Carter
  - Closing Comments: Doug Hewett

November 2016
SMT Retreat

January 2017
Café Conversation

February 2017
CIP/TIP Presentation and
Strategic Planning Retreat

March 2017
SMT Performance Management
Session and
Strategic Plan Follow Up

April 2017
Budget Development

May 2017
Budget Presentations/Work Sessions

June 2017
Budget Adoption